Integrated Organization & Membership Plan

A strategic building block for achieving our full potential under the AAI Transformation Project

Presented to

National and Regional Alumni Association Leaders

(NAAs & RAAs)

Integrating AIESEC's Global Alumni Organization and Membership

Following consultations with alumni leaders in both Vienna & Mexico,
this plan provides details on AAI's integrated organization and membership.

- **Independent entities** (as today).
- **Shared goals** (Alumni-to-Alumni, Alumni-to-AIESEC and Alumni-to-World).
- **Clearly defined roles and responsibilities** (at each level).
- **Integrated membership** (join anywhere and be a globally-recognized member).
- **Funding valuable programs** (with local, national and international benefits).

AAIC Mexico Integrated Organization & Membership Workshops, March, 2014

- Workshops were held on Integrated Membership & Integrated Organization, with NAA and RAA leadership from around the world

- AAI received feedback on its proposals, which has been incorporated into this plan and the Charter Strategic Partnership Agreement ("The Charter")

Integrated Organization & Membership Workshop Feedback

- NAAs and RAAs agreed to proceed with Integrated Organization & Membership as proposed

- There is broad consensus for paid membership under a single fee sharing agreement (with some dissension)

- Consensus was to implement a membership approval process in order to align with existing NAA processes

- There is a need to agree on universal definitions of "Alumnus" and "Member" in order to unify policies

- Members should be able to select their home NAA country even if they live in another country

- AAI statutory changes are being evaluated in order to implement membership requirements and an approval process

Integrated Organization & Membership Workshop Feedback (2)

- The timing for full implementation & scaling is dependent on:
    - NAAs establishing their legal/statutory status as the recognized alumni entity with AAI
    - Signature of The Charter
    - Implementation of AlumNet (in order to scale)
    - Coordinated membership campaigns at the AAI, RAA & NAA levels
- *NOW* is the time for the organization to move forward decisively with the integrated organization and membership initiative

AIESEC's Global Alumni Organization
Roles and Responsibilities at Each Level

	AAI AIESEC ALUMNI INTERNATIONAL	**RAA** REGIONAL ALUMNI ASSOCIATIONS	**NAA** NATIONAL ALUMNI ASSOCIATIONS
Programs	• Design and implement global programs.	• Encourage program adoption by NAAs and develop regional program opportunities.	• Implement and supplement.
AlumNet	• Develop, manage and maintain AlumNet.	• Create a regional page using AlumNet templates.	• Create national and local pages using AlumNet templates. • Manage/maintain their NAA database.
Development	• Define and disseminate best practices and establish new NAAs or provide support to RAAs.	• Establish new NAAs in their region.	• Recruit and develop local alumni groups.
Coordination	• Solicit input from RAAs and NAAs. • Coordinate mktg campaigns with RAAs, NAAs.	• Provide regional input to AAI.	• Provide national input to RAA and/or to AAI.
Database	• Maintain *global* database in synergy with AI and NAAs.	• Update and use database for regional communications, subject to agreements.	• Work with AAI on *national* data management, subject to agreements.
Events / Awards	• Organize *global* events and awards.	• Organize *regional* events and awards.	• Organize *national* and local events/awards.
Support Services	• Provide all levels with membership payment and admin, data services, programs, templated pages.		
Commun-ication	• Publish global newsletter and other marketing communications.	• Publish regional newsletter using AlumNet template.	• Publish national and local newsletters using AlumNet templates.
AIESEC	• Represent Alumni with AI and encourage alumni support.	• Represent AIESEC Alumni at regional events and encourage alumni support	• Represent AIESEC Alumni with MC and encourage alumni support.
Governance	• AAI members vote in legislative sessions.	• Elected presidents of RAAs that enter into cooperation agreements with AAI invited to join AAI's Executive Board as ex-officio members. • NAA members vote on regional matters.	• NAA members vote at the national level.

AIESEC's Global Alumni Organization
Funding Needs and Revenue Sources

	AAI AIESEC ALUMNI INTERNATIONAL	RAA REGIONAL ALUMNI ASSOCIATIONS	NAA NATIONAL ALUMNI ASSOCIATIONS
Funding Needs	• Small global office and team. • Development, hosting and maintenance. • Membership management, payment administration, accounting and reporting. • Transaction costs and infrastructure (i.e., credit cards, PayPal). • AAIM event expenses. • Communications expenses, including email delivery . • Marketing expenses. • Advisory services (e.g., legal, financial)	• Volunteer team. • Advisory services (e.g., legal, financial) • Regional event expenses.	• Volunteer team. • Advisory services (e.g., legal, financial) • National event expenses. • Any expenses that NAA incurs by choosing not to use the global web platform (communications, website, membership, data management…).
Funding Sources	• Membership dues. • AlumNet-based program fees • Alumni donations (AAI Seed Fund). • Corporate sponsors. • AAI event fees • Volunteers and in-kind support.	• Membership dues. • Regional event and program fees • Volunteers and in-kind support.	• Membership dues. • Corporate sponsors. • Alumni donations. • National event and program participation fees • Volunteers and in-kind support.

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AIESEC's Global Alumni Organization
Paid Membership & Fee Sharing

Integrated Membership Description	• Each entity sells an identical €25 annual global alumni membership package that includes the following benefits: – Access to AlumNet member-only programs that provide benefits at the local, national and international levels; – Discounted attendance at AAI events when offered; – Voting rights at the national, regional and global levels. • Membership dues will help defray product development and administrative costs. In the case of AAI, dues will help support the cost of developing AlumNet and of a small global office to handle global service functions (membership, finance, marketing, sponsorships)that will benefit all alumni. • Registration on AlumNet is free, but access to certain services will require membership. • Membership is optional for all alumni		
Membership Dues Sharing Formula	• €10 to AAI.	• €5 to the RAA	• €10 to the NAA which the alumni declares as his/her "home" alumni country.
Add-on Services that can be Sold Separately	• Optional programs • Alumni-to-alumni business promotion.	• Regional programs and events	• Local programs and events • Premium membership packages.
Administrative Matters	• 100% of membership dues from members residing in non-participating countries will help fund AAI. • Each entity will market global alumni memberships with the understanding that revenue will be shared in accordance with the formula. • The accounts will be trued up every three months or when the balance owed to one party or the other reaches a pre-determined level.		

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Establishing RAA & NAA Legal/Statutory Credentials & Recognition

- RAAs & NAAs must provide AAI with organization statutes, bylaws and/or minutes which demonstrate that they are the recognized, legitimate alumni organization in their region or country

- NAAs must obtain a letter from their AIESEC MC which recognizes them as the official alumni organization in their country

- Registration as a legal entity recognized by the government is preferred but not required

"The Charter" Strategic Partnership Agreement

- Developed by AAI with NAA and RAA feedback
- Simplified agreement that binds AAI, RAAs and NAAs together into a formal partnership
- Formalizes the roles & responsibilities of entities at each level
- Provides autonomy and flexibility for individual initiatives and programs
- Formalizes a cohesive structure that is necessary in order to grow

Requirements for NAA Partnership with AAI

1. Complete a National Alumni Association (NAA) Application & Profile (under development)

2. Submit a copy of its statutes and/or legal registration

3. Submit a letter from their AIESEC MC which recognizes them as the official alumni organization in their country

4. Sign The Charter Strategic Partnership Agreement ("The Charter")

Requirements for RAA Partnership with AAI

1. Complete a Regional Alumni Association (RAA) Application & Profile (under development)

2. Submit a copy of its statutes and/or legal registration

3. Sign the RAA Strategic Partnership Agreement

Universal Definitions: Alumnus vs. Member

- **"Alumnus" (or "alum"):** a former active member of AIESEC who participated either at the local, national or international committee level for at least one year, or who took an AIESEC traineeship in another country

- **"Member":** any alumnus who is an approved participant in an AIESEC alumni association which has signed the Charter Strategic Partnership Agreement with AAI, and who has paid the Membership Fee

- **"Membership Fee":** an annual or Lifetime Membership payment that provides Membership in the Integrated Organization, with rights and privileges at the Global, Regional, National and Local levels

- **"Registrant":** any alumnus who has registered on AlumNet and completed an AlumNet profile

What Do These Definitions Mean?

Alumnus:

- *Everyone* who meets the definition of "alumnus" is free to participate in the alumni association at any level

- You do not need approval to be an alumnus or registrant

Membership:

- Reserved for those who pay the annual membership fee

- Requires going through an NAA membership approval process

- **I**s entirely optional and up to each individual

- Offers certain advantages:
  - Access to "members-only" programs and services through AlumNet
  - The ability to vote in legislation and elections

Membership Approval Criteria

- Must meet the universal definition of an Alumnus (alum)
- Has not demonstrated to be in violation of the AAI Code of Ethics & Code Conduct* in the past
- Must be willing to adhere to the AAI Code of Ethics & Code of Conduct in the future
- Must be willing to pay the Membership Fee

*Currently under development

Membership Approval Process

Pre-AlumNet:

- Alumni who are interested in membership shall complete an Membership Application Form (needs to be developed)

- The form can be submitted to AAI, and RAA or an NAA

- The form shall be routed to the NAA for review and approval

- Applications shall be reviewed and either approved or rejected by the NAA within 30 days of receipt

- Approved candidates shall become Members upon paying their dues

- NAA shall forward the Membership Application Form to AAI for registration in the AAI Membership database and tracking

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Membership Approval Process (2)

Post-AlumNet:

- Alumni who are interested in membership shall complete an online AAI Membership Application Form in AlumNet

- The Application Form shall be routed through AlumNet to the NAA for review and approval

- Applications shall be reviewed and either approved or rejected within 30 days of receipt

- Approved candidates shall become Members upon paying their dues

- Approved Members shall receive member-only privileges on AlumNet.

Implementation Plan

1. Announce the launch of the initiative on our blog & via email to NAAs and RAAs

2. Send The Charter out to all identified RAAs and NAAs for signature - June

3. Receive RAA & NAA Legal/Statutory documents and by EB – July/August

4. AII to work with RAAs and NAAs to develop & begin execution of membership campaigns - September

Conclusions

Goal: complete execution of The Charter with 2 RAAs and 30 NAAs by September 30, 2014

- After two years of discussion & consensus building, **now** is the time to take action & press forward with implementation

- Not all NAAs are ready or willing to implement this program immediately, but we must get started and build momentum

- Each country will have its own issues & constraints, which must be recognized and respected

- Achievement of Integrated Organization & Membership will be a key success factor in the Transformation Project.